

## **Miami-Dade County**

## In-Progress Evaluations Conversion - Job Aid

As of: Thursday, September 1, 2022



## **DESCRIPTION**

This job aid is for DPRs.

The purpose of this job aid is to help end users recreate performance evaluations in INFORMS that were not completed in legacy.





## MANUALLY GENERATE PERFORMANCE EVALUATION DOCUMENT

Step	Action
1.	<ul> <li>Log into INFORMS.</li> <li>Navigate to Human Resources (HCM) &gt; Performance Administration &gt; Performance Documents &gt; Create Documents</li> </ul>
2.	<ul> <li>Select the Add a New Value tab.</li> <li>Enter a name in the Run Control ID field.</li> <li>Select the Add button.</li> </ul> Performance Administration          Create Documents         Find an Existing Value         Add a New Value         Run Control ID         2022evsl
3.	<ul> <li>Enter the date that Employee's evaluation period began in the Period Begin Date field.</li> <li>Enter the date that Employee's evaluation period began in the Period End Date field.</li> <li>         Performance Administration         Run Control ID 2022eval         Performance Menager         Process Monter         Run Control ID 2022eval         Period Begin Date [0301/202] [Period End Date [Period End Date</li></ul>

Depending on the Employee, the DPR should select one of the following types of evaluation documents: Description **Document Type** 4. MDC SR. MANAGEMENT MX Senior Management/Executive Evaluation **MDC-Annual Review EE** Employee Evaluation MDC-Prof/Supervisory Review ME Professional/Management Evaluation Select the **Document Type** list and select the desired Performance Document. Performance Administration 🐔 Q 🔍 1 New Window 1 Help ] Personalize Page **Create Documents** Report Manager Process Monitor Run Control ID 2022eval Run Run Request Parameters 5. Period Begin Date 03/01/2022 Period End Date 03/01/2023 ment Type Template ID 2 NDC Performance Improvement PI NDC SR MGT SA 2 NDC SR MANAGEMENT MX MDC-Annual Review LE NDC-PR0TSupervectory Review ME NDC-Sr Mgr. Prof. SA Performance Document in Math Select the Template ID list and select the available option. Performance Administration Q Q \* **Create Documents** Run Control ID 2022eval Report Manager Process Monitor Run 6. **Run Request Parameters** Period End Date 03/01/2023 Period Begin Date 03/01/2022 Document Type MDC-Annual Review EE ~ Template ID Employee Ferto 2 Manager Selection Method

informs



	Select the Manager Selection Method list and select the By Part Posn Mgmt Supervisor
	option.
	( Human Resources (HCM) Performance Administration 👫 🔍 쿚 : 🚃
	Create Documents
	Create Documents           Run Control ID         2022eval         Report Manager         Process Monitor         Run
	Delete Document
	Reopen Dooument Run Request Parameters
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7.	Template Definition Manager Selection Method By Concentrated Manager (0)
	By Group ID By Manager ID By Manager ID By Part Provident More ID
	Auto Transfer Document Status Create Documents Using By Reports To Postion By Reports T
	Group ID     CEmployee ID
	<b>Note:</b> If Position Management is missing a Supervisor and/or the Employee is no longer
	reporting to the Supervisor they reported to during the evaluation year, go to <b>Step 15</b> .
	Solact the Employee ID option
	• Select the <b>Emplip</b> field, then enter the Employee's ID.
	Select the <b>Save</b> button.
	Create Documents Using
	O Group 10 💽 Employee 13
0	Documents Using Employee ID
٥.	Employees to Process
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	Save Notify Add Update/Display
	Select the <b>Run</b> button.
	Performance Administration 🛛 💏 🔍 👳 🗄 🗮
	New Window   Help   Personalize Page   🗊
	Create Documents
	Run Control ID 2022eval Report Manager Process Monitor Run
9.	
	Run Request Parameters
	Period Begin Date 03/01/2022
	Document Type MDC-Annual Review EE 🗹 Template ID Employee Performance Eval 💟
	Manager Selection Method By Part Posn Mgmt Supervisor



	Select the <b>OK</b> button.
10.	Process Scheduler Request ×
	Help
	User ID T0140835 Run Control ID 2022eval
	Server Name Run Date 03/20/2022
	Time Zone Q
	Process List
	Select Description Process Name Process Type +Type +Format Distribution
	Mass Create Employee Documents EP_MORDOC Application Engine Web V TXT V Distribution
	OK Cancel
	Note the <b>Process Instance</b> number, then select the <b>Process Monitor</b> link.
	Performance Administration A C S E E
11	Create Documents
±1.	Run Control ID 2022eval Report Manager Process Monitor Run
	Process Instance:297308
	Recall the <b>Process Instance</b> number from the previous step in order to identify the
	correct row.
	Process List
12.	Select Instance Seg. Process Type Process Name User Run Date/Time Run Status Distribution Details
	297308 Application Engine EP_MGRDOC T0140835 03/20/2022 6:42:45PM EDT Success N/A Details
	Select the <b>Refresh</b> button.
	• Repeat the previous step occasionally until <b>Distribution Status</b> displays "Posted".
	Performance Administration 🕜 🤍 🛃 :
	Process List Server List
	View Process Request For User ID T0140035 Q Turne V Last V 1 Days V Refresh
13.	Server V Name Q Instance From Instance To Report Manager
101	Run Distribution Status Status
	Process List
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	297306 Application Engine EP_MGRDOC T0140635 03/20/2022 6:42:45PM EDT Success Posted Details



14.	<ul> <li>After generating a performance evaluation manually, the DPR may validate their results as follows:</li> <li>To view the results of running the process to generate performance documents manually, navigate to NavBar &gt; Navigator &gt; Human Resources (HCM) &gt; Workforce Development &gt; Performance Management &gt; View Document Creation Results.</li> <li>To view all performance evaluation documents, navigate to NavBar &gt; Navigator &gt; Human Resources (HCM) &gt; Workforce Development &gt; Performance Development &gt; Performance Management &gt; Performance Management &gt; Navigator &gt; Human Resources (HCM) &gt; Workforce Development &gt; Performance Documents, navigate to NavBar &gt; Navigator &gt; Human Resources (HCM) &gt; Workforce Development &gt; Performance Management &gt; Performance Management &gt; Performance Management &gt; View Documents.</li> </ul>
15.	Note: Perform the following if Position Management is missing a Supervisor and/or the Employee is no longer reporting to the Supervisor they reported to during the evaluation year: • Select the Manager Selection Method list and select the By Manager ID option. • Select the Manager ID field, then enter the former Supervisor's 8 digit Empl ID. • Select the Manager ID field, then enter the former Supervisor's 8 digit Empl ID. • Create Documents Run Control ID PRIORYEAREVAL Report Manager Process Monitor Run • Control ID PRIORYEAREVAL Report Manager Process Monitor Run • Manager Selection Method By Manager ID • Manager ID 00124506 Kilvondra Stocker